

Job Aid:

How to Clone a Bid in COMMBUYS

This Job Aid shows how to:

- Clone a Bid in COMMBUYS
- Edit and create a “Sent” Bid

Of Special Note:

Bids (solicitations) are published documents that request price quotes on goods and services from potential vendors. Cloning will allow you to copy (or clone) a previously created Bid in order to create a new BID, thus eliminating the need to re-enter the majority of the data. This job aid focuses on cloning a bid created in COMMBUYS.

Keep in mind: When cloning a Bid in COMMBUYS, you may need to do the following:

- All documents required should be added to the Bid using the Attachments tab in COMMBUYS.
- Cloning migrated Comm-PASS Bids in COMMBUYS does not carry over the attachments, however Bids created or previously cloned in COMMBUYS carry over all attachments from the original Bid to the cloned Bid. Therefore you may choose not to add or upload attachments to the cloned Bid, or delete attachments that carry over. Remember to review all attachments and make changes, specifically to all time sensitive information.
- The new Bid will have new document # and allow you to edit data in any way you need to in order to update the bid information. The last page of this job aid contains a table with operational definitions for the types of Bids and COMMBUYS navigation.

Screenshot



Welcome To **COMMBUYS**

COMMBUYS
OPERATIONAL SERVICES DIVISION

COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

COMMBUYS INFORMATION:
For more information on COMMBUYS please visit the [COMMBUYS](#) support pages.
[Training and Registration for Purchasers](#)
[Training and Registration for Sellers](#)
[Job Aids for Purchasers](#)
[Job Aids for Sellers](#)

If you have any questions or concerns contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-627-8283 or 617-720-3197.

- [Register](#)
Register here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to registering.
- [Complete Registration](#)
Complete registration here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to completing registration.
- [Open Bids](#)
Browse open bid opportunities.
- [Active Contracts](#)
Browse active Contracts/Blankets.
- [Contract & Bid Search](#)
Search for Bids and active Contracts/Blankets.
- [Registered Vendor Search](#)
Search for registered vendors.

Login ID:
 Password:

[Forgot your password?](#)

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Directions

1. Launch the COMMBUYS website by entering the URL
<https://www.commbuys.com/bsol>
 into the Browser

Enter your Login ID and Password

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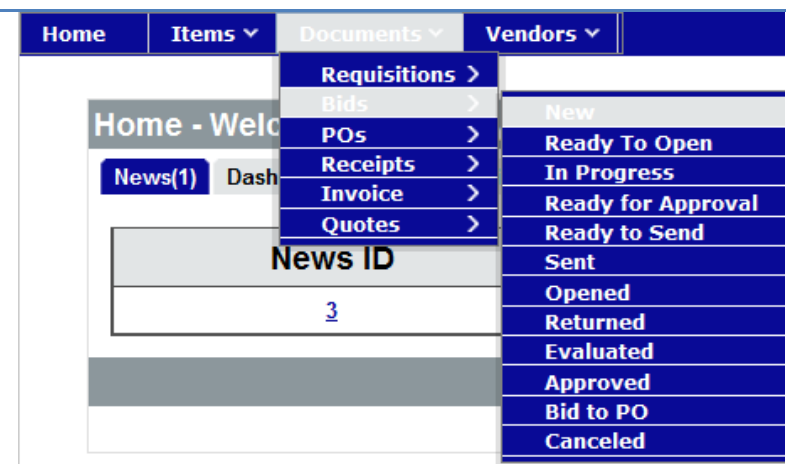
Screenshot



Directions

2. Upon successful login, select the **Basic Purchasing** role on the upper right side of the page if not selected already.

Note: If you only have one user role, Basic Purchasing, no tabs display.



3. To clone a new bid from one originally created in COMMBUYS go to the blue Navigation Bar, and select **Documents > Bids > New**

Create a New Bid

Please select the method to create a new bid:

- ☐ Create a bid from scratch.
- ☒ Clone a bid from another document.
- ☐ Copy Contracts For Renewal.

Continue

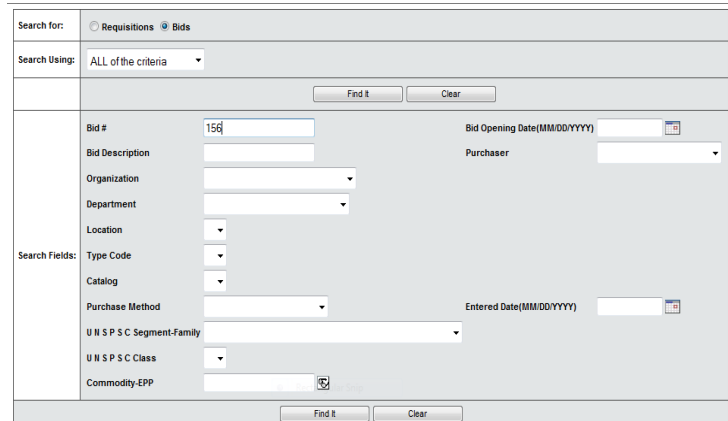
Cancel & Exit

4. The Create a New Bid window opens with three options:

- Create a bid from scratch
- Clone a bid from another document
- Copy Contracts For Renewal

Click the radio button next to **Clone a bid from another document**.

Click the **Continue** button.



5. The Search Box displays. Next to **Search for:** click the radio button for **Bids** and enter the search criteria for the bid that you wish to clone.

Some Search Options include:

- Bid #: COMMBUYS Bid number
- Bid Description: department number schema, formerly the Comm-PASS Bid title
- Purchaser
- Organization
- Department

Click the **Find It** button.

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Results

26-50 of 8831
1 2 3 4 5 6 7 8 9 10 > >>

Select	Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	Status	Alternat
<input checked="" type="radio"/>	0000156	Life preservers for a summer recreational program	Blanket	03/06/2014 07:53:00 AM	XYZ01 / PUR01	Paul Comparetti	\$0.00	Sent	
<input type="radio"/>	0000155	Life preservers for a summer recreational program	Blanket	03/06/2014 07:54:00 AM	XYZ01 / PUR01	Paul Comparetti	\$0.00	Sent	
<input type="radio"/>	0000154	Life preservers for a summer recreational program	Blanket	03/06/2014 07:55:00 AM	XYZ01 / PUR01	Paul Comparetti	\$0.00	Sent	
<input type="radio"/>	0000153	Life preservers for a summer recreational program	Blanket	03/06/2014 07:56:00 AM	XYZ01 / PUR01	Paul Comparetti	\$0.00	Sent	
<input type="radio"/>	0000152	Life preservers for a summer recreational program	Blanket	03/06/2014 07:57:00 AM	XYZ01 / PUR01	Paul Comparetti	\$0.00	Sent	
<input type="radio"/>	0000151	Life preservers for a summer recreational program	Blanket	03/06/2014 07:58:00 AM	XYZ01 / PUR01	Paul Comparetti	\$0.00	Sent	
<input type="radio"/>	0000150	Life preservers for a summer recreational program	Blanket	03/06/2014 07:59:00 AM	XYZ01 / PUR01	Paul Comparetti	\$0.00	Sent	
<input type="radio"/>	0000149	Life preservers for a summer recreational program	Blanket	03/06/2014 08:01:00 AM	XYZ01 / PUR01	Paul Comparetti	\$0.00	Sent	

Directions

6. The Search Results page appears with a list of Bids created in COMMBUYS.

Click on the radio button next to the Bid you wish to select to clone.

Click **Clone Bid & Exit**

7. Another way to clone a Bid is to open the Bid you wish to clone.

Select the **Summary** tab and scroll to the bottom of the page.

Click the **Clone Bid** button

Blanket Bid S168992-vCurrent Status: 280 - Opened

General Items Address Accounting Routing Attachments() Notes Bidders Questions Amendments() Q&A Reminders **Summary**

Header Information

Bid Number:	S168992-vCurrent	Description:	Request for Quote - OSD IPR #16 Project Manager	Status:	280 - Opened
Purchaser:	Algeria Walsh	Minor Status:		How Solicited:	Email
Organization:	Operational Services Division				
Fiscal Year:	14	Department:	1000COVD - Default Data Conversion Department	Location:	1000L - Default Data Conversion Location
Show On Web:	Yes	Allow Electronic Quote:	Yes	Required Date:	
Bid Opening Date:	04/30/2014 04:52:00 PM	Available Date:	02/25/2014 03:30:00 PM		
Purge Date:		Informal Bid:	No		
Bid Type:	Open Bid	Estimated Cost:	\$0.00	Print Desc Detail:	
Alternate ID:	ITS33_ProgPlan-FY14-OSD-001	Purchase Method:	Blanket	Catalog Id (for contract):	
Blanket/Contract Begin Date:	01/01/9999 12:00:00 AM	Blanket/Contract End Date:	01/01/9999 12:00:00 AM	Type Code:	NS - Non-Statewide Solicitation
Info Contact:	Raphaela Miller, Address: One Ashburton Place Room 1017 Boston, MA 02114, Phone: 617-720-3136, Email:	Bulletin Desc:		Pre-Bid Conference:	

There are no pre-bid approval paths found for this bid.

[Bid Tab](#) [Cancel Bid](#) [Clone Bid](#) [View Quote History](#) [Print](#)

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How to Clone a Bid in COMMBUYS

Screenshot

Blanket Bid BD-15-1080-1080C-1080L-00000000263 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

General Validation Errors

- The following required fields are missing: bid opening date, available date.

Bid Number: BD-15-1080-1080C-1080L-00000000263 Description: COMMBUYS Communications

Status: ZBI - In Progress Purchaser: Buyer, Buyer

How Solicited: Email Type Code: SH - Historical Solicitation

Department: 1080CONVD - Default Data Conversion Department Fiscal Year: 2015

Location: 1080L - Default Data Conversion Location Organization: Operational Services Division

Show on Web: ☒ Allow Electronic Response: ☐

Required Date: Bid Opening Date: (MM/DD/YYYY HH:MM:SS AM or PM)

Available Date: (MM/DD/YYYY HH:MM:SS AM or PM) Purge Date: (MM/DD/YYYY)

Bid Type: Open Bid Informal Bid: ☐

Control Code: Estimated Cost: \$0.00

Print Dest Detail: Always Alternate ID:

Purchase Method: Blanket Catalog ID:

Blanket Begin Date: (MM/DD/YYYY) Blanket End Date: (MM/DD/YYYY)

Tax Rate: Print Format: Bid Print Form

Item Single Award Only: ☐ Solicitation Enabled: No

Info Contact:

Pre-Bid Conference: (Max size: 250 characters)

Bulletin Desc: (Max size: 500 characters)

Quote Notification: ☐

Transaction Size (Commonwealth Departments Only):

Date Last Updated: 08/28/2014 02:54:10 PM User last Updated: Buyer Buyer

Save & Continue

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Directions

8. A new Bid is created and opens to the **General** tab where important information about the bid is entered, such as: setting the bid dates and bid type.

Note: Red Validation errors display upon initial creation of the bid. These will resolve after entry of all required information.

Mandatory fields for Bid:

- Department:** select from the department from dropdown, if not automatically populated
- Location:** select the location dropdown; if not automatically populated
- Available Date:** date the bid will be viewable on COMMBUYS
- Purchase Method** (dropdown): select from the dropdown
 - Open Market – one time bid
 - Contract – do not use
 - Blanket – results in a contract (departmental or statewide)
- Description:** is a searchable field; enter short bid description (option to use your agency's Bid numbering schema)
- Purchaser:** defaults to designated purchaser
- Fiscal Year:** will auto populate but can be changed
- Bid Opening Date:** use the calendar icon to select the scheduled date to open the bid for review and award, which closes the bid to vendors. COMMBUYS will no longer accept quotes for that Bid and the Buyer is able to open and view quotes.
- Print Format:** only one option; ignore

Mandatory fields for Blanket (contract):

- Purchase Method:** dropdown; if Blanket is selected, two additional fields requiring input populate:
 - Blanket Begin Date:** beginning date of the blanket, use the calendar icon to select date
 - Blanket End Dates:** blanket end date, use the calendar icon to select date
- Type Code:** dropdown; only use the two options below
 - SS – Statewide Solicitation (only authorized SW contracts)
 - NS – Non-Statewide Solicitation

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(continued from previous page)

Optional fields:

- **How Solicited:** select from dropdown
 - Email (default)
 - Fax
 - Telephone
 - Walk-In
- **Show on Web:** controls if the bid displays and is searchable in COMMBUYS – general rule to leave checked
- **Required Date:** use calendar icon to select the date the commodity or service is required; can also be left blank
- **Bid Type:** select from dropdown
 - Open – available for all Vendors to view and respond (default)
 - Closed – only selected Vendors on the Bid can view and respond
- **Control Code:** leave blank
- **Print Dest Detail:** leave blank
- **Tax Rate:** n/a for Commonwealth
- **Item Single Award Only:** leave unchecked
- **Purge Date:** **DO NOT use**
- **Informal Bid (check box):** if selected, you can view the submitted vendor quotes before bid opening date but cannot award them
- **Alternate ID:** leave blank

Click the **Save & Continue** button when finished.

General **Items** Address Accounting Routing Attachments Notes(?) Bidders Questions Amendments Q & A Reminders Summary

Sort by Column: Print Sequence ☐ Sort Descending

Item #	Print Sequence	Item Description							Total Cost	Delete
		Quantity	UOM	Unit Cost	Net Unit Cost	Total Discount Amt.	Tax Rate	Tax Amount		
1	1.0	Life Preservers							\$0.00	<input type="checkbox"/>
		1.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	\$0.00	<input type="checkbox"/>
Total									\$0.00	

Save & Continue Search Items Search Inventory Items Add Item

9. Click the **Items** tab. The Items tab opens.

First delete the item(s) if they do not apply to this new clone. Click the check box next to the item or to delete all click the top Delete box and click **Save & Continue**.

There are three options to add an item

- Search Items
- Search Inventory Items
- Add Items

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Screenshot

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: 2BI - In Progress

General **Items** Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

Item #: Item Type: Normal

Print Sequence*: 1.0 Item Status: 2BI - In Progress

Description*: Stock Item Number:

Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
0.0	0.00	\$0.00	EA	0.0	0.00	\$0.00

UNSPSC Segment-Family: Tax Rate:

UNSPSC Class: Tax Amount: \$0.00

Commodity-EPP: Extended Amount: \$0.00

Manufacturer: Brand: Model:

Make: Packaging:

Save & Add New Save & Exit Save & Continue Reset Cancel & Exit

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Directions

10. Click the **Add Items** button. Input the item information. Major fields on this page include:

- **Print Sequence*** – value defaults
- **Description*** – enter complete description of good or service; be as specific as possible
- **Quantity** – enter quantity (must be at least 1)
 - If bid is for a specific number enter that quantity; if unknown enter 1
- **Unit Cost** – N/A, unless known then enter a cost
- **UNSPSC** – set of codes that classify goods and services into standardized groups; use the drop down or eye glass icon to search for the most relevant code (see step 11)
 - Segment/Family
 - Class
- **Other Product Information** – these fields are optional, use them to provide additional details about the solicited goods or services.

11. To add the UNSPSC code to the item, go to the UNSPSC Segment / Family field and click the eyeglass icon. The Search page for UNSPSC Segment / Family opens.

The Search Code screen populates, use the available search dropdowns and fields to find the best code. Select the radio button on the left side of the screen to choose the best code and click the **Save & Exit** to return to the Items tab.

Add as many items as required for the Bid, by clicking **Save & Add New**. Click the **Save & Exit** button once finished with all required bid items and the **Items General** tab redisplay.

Commodity-EPP and Service Codes

Search

UNSPSC Segment-Family:

UNSPSC Class:

UNSPSC Keyword:

Search using:

Search

UNSPSC Code Browse

Code	Description
15-14-01	Water reducing agents
15-14-02	Waterproofing agents
25-14-01	Process water treating equipment
25-14-02	Safety and rescue watercraft
25-14-03	Utility watercraft
25-14-04	Recreational watercraft
25-40-01	Water jet cutters
25-40-02	Laboratory water purification equipment and supplies
45-14-01	Watercraft
45-14-02	Water and wastewater treatment supply and disposal
45-14-03	Water equipment and accessories

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How to Clone a Bid in COMMBUYS

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Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: ZBI - In Progress

General Items **Address** Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

Ship-to Address	Bill-to Address
1080 - Conversion Address 	1080 - Conversion Address 
One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperscope.com	One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperscope.com

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

12. Click the **Address** tab to continue the bid.

Review the Ship-to and Bill-to Addresses. Click the Eyeglass icon to add or change either address.

Note: Organization Administrators maintain the Ship-to and Bill-to addresses. To update or add additional addresses, contact the OA.

Lookup Ship-to Address - Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257

Search Using: ALL of the criteria

Search Fields:	Department ID		Department Name	
	Department Suffix ID		Department Suffix Name	
	Location ID		Location Name	
	City		County	

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Find It Clear

Close Window

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13. The Lookup Ship-to Address window displays. Input the search criteria and click **Find It**.

If no criterion is entered all possible addresses for the Organization will appear by clicking **Find It**.

Select	Department ID	Department Name	Department Suffix ID	Department Suffix Name	Address Info
<input checked="" type="radio"/>	00100	PETS PLUS	100	10055	Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)999-9999



Select Close Window

14. The search results display. Check the radio button in the Select column adjacent to the address you would like to select.

Click the **Select** button at the bottom of the page.

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General Items **Address** Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

Ship-to Address	Bill-to Address
1080 - Conversion Address 	1080 - Conversion Address 
One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperscope.com	One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperscope.com

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

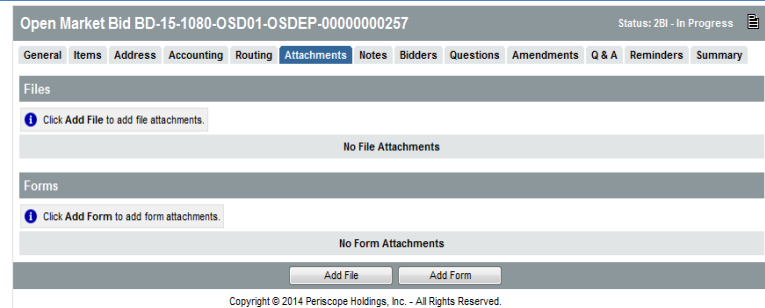
15. The search page closes and the selected address populates with the Ship-to Address.

Click the **Save & Continue** button.

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Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: 2BI - In Progress

General Items Address Accounting Routing **Attachments** Notes Bidders Questions Amendments Q & A Reminders Summary

Files

Click Add File to add file attachments.

No File Attachments

Forms

Click Add Form to add form attachments.

No Form Attachments

Add File Add Form

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Directions

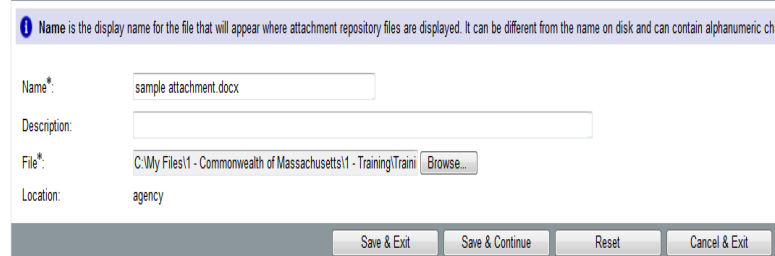
16. Click the **Attachments** tab.

The **Attachments** tab displays. Click the **Add File** button to add a new file.

There are currently no size limitations for files, and COMMBUYS supports all file types for Buyers.

Note: Add Form is not a currently working function in COMMBUYS

Add File



Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters.

Name*: sample attachment.docx

Description:

File*: C:\My Files\1 - Commonwealth of Massachusetts\1 - Training\Traini Browse...

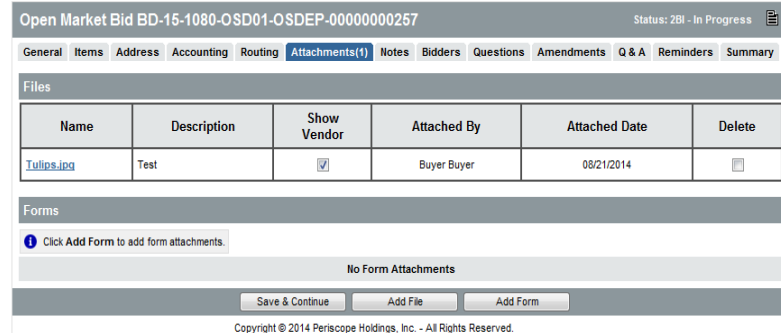
Location: agency

Save & Exit Save & Continue Reset Cancel & Exit

17 The Add File window opens. Complete the following fields:

- **Name** – auto populates after file selection
- **Description:** optional but recommended; a short description of the file.

Click the **Browse** button to select a file. To add another file, click the **Save & Continue** button. When all file uploads are complete, click the **Save & Exit** button.



Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: 2BI - In Progress

General Items Address Accounting Routing **Attachments(1)** Notes Bidders Questions Amendments Q & A Reminders Summary

Files

Name	Description	Show Vendor	Attached By	Attached Date	Delete
Tulips.jpg	Test	<input checked="" type="checkbox"/>	Buyer Buyer	08/21/2014	

Forms

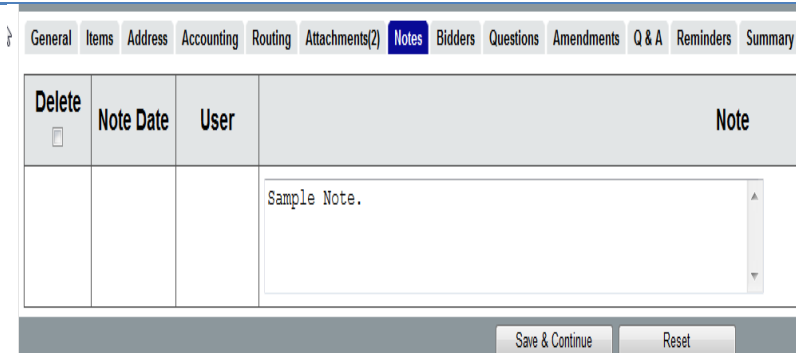
Click Add Form to add form attachments.

No Form Attachments

Save & Continue Add File Add Form

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18. The Attachments tab redisplay with the new file attached.



General Items Address Accounting Routing **Attachments(2)** **Notes** Bidders Questions Amendments Q & A Reminders Summary

Delete	Note Date	User	Note
			Sample Note.

Save & Continue Reset

19. Select the **Notes** tab.

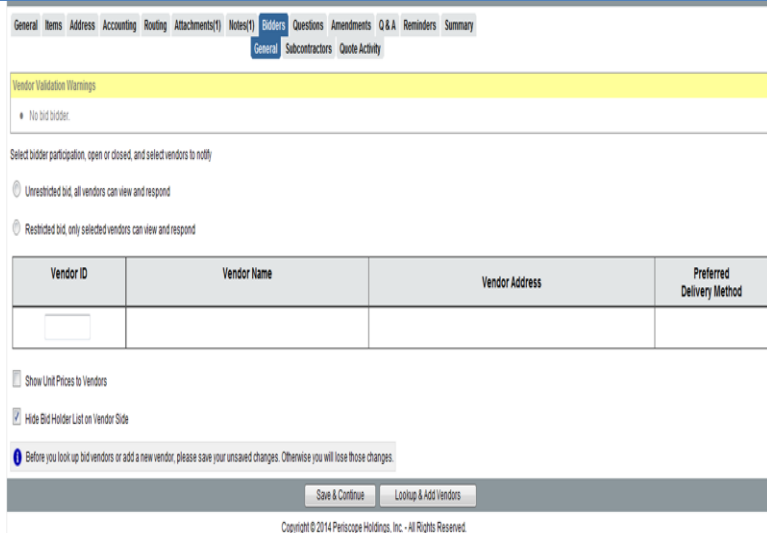
Add an optional note in the Note box. Click the **Save & Continue** button.

Notes are only viewable by Commonwealth users; vendors will not have access to view these notes, but they are part of the public record.

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How to Clone a Bid in COMMBUYS

Screenshot



The screenshot shows the 'Bidders' tab in the COMMBUYS system. At the top, there are tabs for General, Items, Address, Accounting, Routing, Attachments, Notes, Bidders, Questions, Amendments, Q & A, Reminders, and Summary. The 'Bidders' tab is active, showing a 'Vendor Validation Warnings' section with a message: 'No bid bidder.' Below this, there are radio buttons for 'Unrestricted bid, all vendors can view and respond' and 'Restricted bid, only selected vendors can view and respond'. A table with columns 'Vendor ID', 'Vendor Name', 'Vendor Address', and 'Preferred Delivery Method' is shown. Below the table, there are checkboxes for 'Show Unit Prices to Vendors' and 'Hide Bid Holder List on Vendor Side'. At the bottom, there are buttons for 'Save & Continue' and 'Lookup & Add Vendors'. A copyright notice for 2014 Periscope Holdings, Inc. is at the very bottom.

Directions

20. Click the **Bidders** tab.

The names of the Bidders listed on the Bidders tab will carry over from the original Bid if there are any. To add new Bidders, click **Lookup & Add Bidders** button.

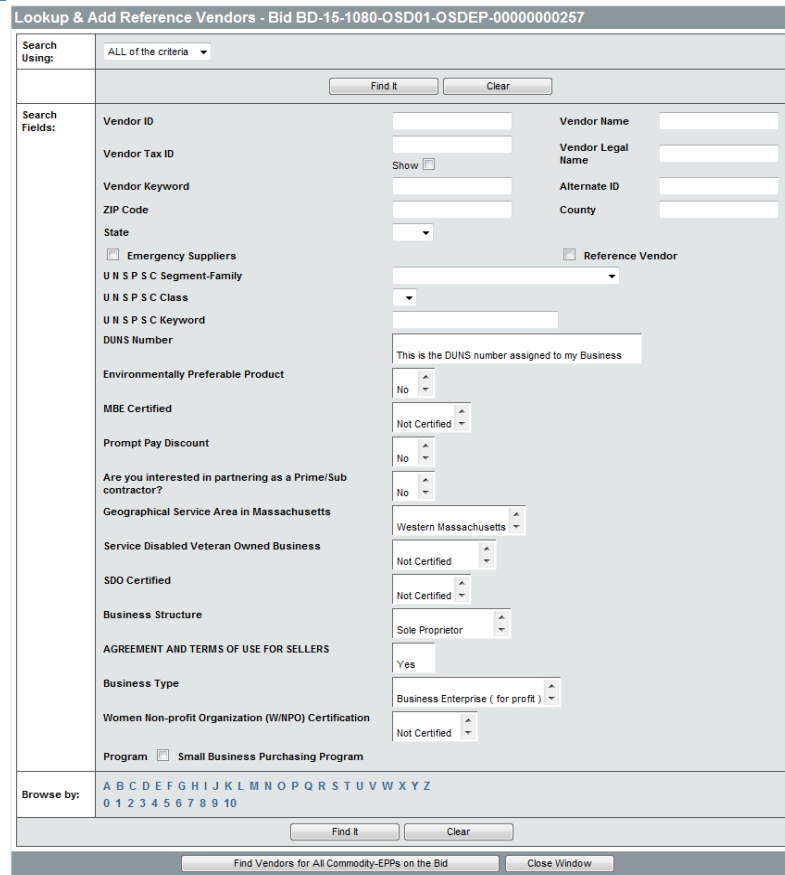
Several options can be set on the Bidders tab:

- **Select bidder participation**
 - **Unrestricted** – any vendor can respond to the bid
 - **Restricted** – only listed vendors can respond to the bid
- **Show the Unit Price to Vendors** – when unchecked (default) bidders cannot see the unit price for bid items
- **Hide Bid Holder List on Vendor Side** – when checked (default), bidders cannot see who has responded to the bid

21. Click **Lookup & Add Vendors**. The Lookup and Add Reference Vendors screen displays.

Scroll to bottom of the screen and select **Find Vendors for All Commodity-EPPS on the Bid** button. The results will display with the Vendors who selected the same commodity code as the bid item(s).

COMMBUYS automatically matches the vendors who have correctly registered with UNSPSC codes; these vendors will receive an email notification of the Bid.



The screenshot shows the 'Lookup & Add Reference Vendors' screen for Bid BD-15-1080-OSD01-OSDEP-0000000257. It features a search form with various fields: Vendor ID, Vendor Name, Vendor Tax ID, Vendor Keyword, ZIP Code, State, Emergency Suppliers, UNSPSC Segment-Family, UNSPSC Class, UNSPSC Keyword, DUNS Number, Environmentally Preferable Product, MBE Certified, Prompt Pay Discount, Are you interested in partnering as a Prime/Sub contractor?, Geographical Service Area in Massachusetts, Service Disabled Veteran Owned Business, SDO Certified, Business Structure, AGREEMENT AND TERMS OF USE FOR SELLERS, Business Type, Women Non-profit Organization (W/ISO) Certification, and Program. There are 'Find It' and 'Clear' buttons at the top and bottom. At the bottom, there is a 'Find Vendors for All Commodity-EPPS on the Bid' button and a 'Close Window' button.



OPERATIONAL SERVICES DIVISION

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Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input type="checkbox"/>	201987	O'Connor & Drew, PC				25 Braintree Hill Park Suite 102	Braintree	MA	David Dilulis	6174711120	No
<input type="checkbox"/>	211456	Revenue Solutions, Inc.				2000 Opportunity Drive Suite 100	Roseville	CA	Jeff Huber	9167808741	No
<input type="checkbox"/>	00000514	The Parris Company, Inc.				PO Box 51501	Boston	MA	Misolia Parris	(781)519-9829	No

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Directions

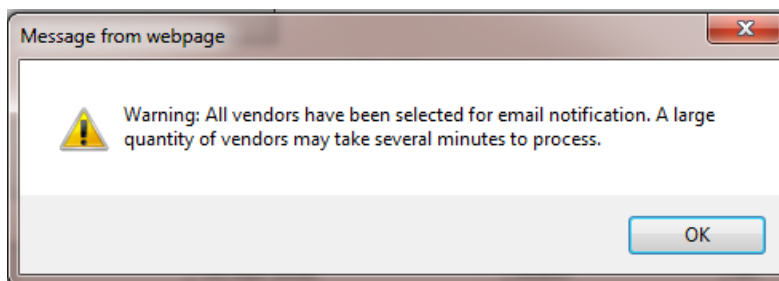
22. Click the top Select checkbox to check all the Vendors.

Buyers can also add vendors by name and also use the other search parameters listed, SDO, SBPP, etc.

A popup window displays with a Warning Message when selecting a large number of vendors.

Click **OK**. The popup window will disappear and all information populates in the bid.

Click **Save & Exit** to return to the Vendors tab



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General Items Address Accounting Routing Attachments(1) Notes(1) **Bidders** Questions Amendments Q & A Reminders Summary

General Subcontractors Quote Activity

Select bidder participation, open or closed, and select vendors to notify

☐ Unrestricted bid, all vendors can view and respond

☐ Restricted bid, only selected vendors can view and respond

Delete	Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method
<input type="checkbox"/>				
<input type="checkbox"/>	00000051	RR Donnelley	Bid Mailing Address: Add New Address General Mailing Address - Susan Sheridan 400 Blue Hill Drive Suite 100 Westwood, MA 02090 US	Paper Copy Mailed
<input type="checkbox"/>	4503	New England Office Supply (NEOS) (MWBE)	Bid Mailing Address: Add New Address General Mailing Address - Patricia Vacca 135 Lundquist Dr Braintree, MA 02184 US	Paper Copy Mailed
<input type="checkbox"/>	4951	Muratec America, Inc	Bid Mailing Address: Add New Address General Mailing Address - Jerry Roberts 3301 E. Plano Parkway, Ste #100 Plano, TX 75074	Paper Copy Mailed

☐ Show Unit Prices to Vendors

☒ Hide Bid Holder List on Vendor Side

i Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

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23. The **Vendors** tab now displays all the selected vendors.

Buyers should see email selected as the preferred method of delivery.

Click **Lookup & Add Vendors** multiple times to ensure that vendors with different commodity codes relevant for your bid are included, by entering the criteria in the search field.

COMMBUYS will create a combined notification list of all vendors you select through multiple vendor searches. If a vendor appears gets selected multiple times, COMMBUYS will keep the company on the list once to avoid duplicate notification.

Job Aid:

How to Clone a Bid in COMMBUYS

Screenshot

Directions

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes(1) Bidders Questions Amendments Q & A Reminders Summary

Delete	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	1.0	<input type="checkbox"/>		AVAILABLE

☐ Delete All

Save & Continue Reset

24. Click the **Questions** tab (this is an optional tab)

The Questions tab allows the addition of questions to the bid the vendors answer as part of the bid response. Questions can be required.

Complete the question entry. Click the **Save & Continue** button.

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes(1) Bidders Questions Amendments Q & A Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show on Web	Show Original Vendor Only	Delete
Add New:						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☐ Allow vendor to submit questions

☐ Send notification when vendor submitting question

Save & Continue Reset

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25. Click the **Q&A** tab. The **Q&A** tab is a way for vendors and the Commonwealth to dialog within the bid.

This feature is only usable before the bid opening date; however, the questions and answers remain viewable after the bid is opened.

In addition to adding the questions, there are two options on this page:

- **Allow Vendor to submit questions** – make sure to check if questions are allowed for the bid
- **Send notification when vendor sends question** – use if you want notifications of questions sent in COMMBUYS

Click **Save & Continue** after entry of each question.

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes(1) Bidders Questions Amendments Q & A Reminders Summary

Due Date* (MM/DD/YYYY)	Comment* (max 250 characters)	Remind Whom*	Days Prior to Remind*	Date Completed (MM/DD/YYYY)	Send Email	Date Entered	Entered By
			0		<input type="checkbox"/>		

Save & Continue Reset

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26. Click the **Reminders** tab (this is an optional tab)

To create a reminder, input the information on the Reminder tab including:

- **Due Date**
- **Comment**
- **Remind Whom**
- **Days Prior to Remind**
- **Send Email**

When the reminder is sent, the tab updates with the Date Completed.



OPERATIONAL SERVICES DIVISION

Job Aid:

How to Clone a Bid in COMMBUYS

Screenshot

Open Market Bid BD-15-1080-OSD01-OSDEP-0000000257 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes(1) Bidders Questions Amendments Q & A Reminders **Summary**

Reader Information

Bid Number: BD-15-1080-OSD01-OSDEP-0000000257 Description: Test Status: ZBI - In Progress
 Purchaser: Buyer Buyer Minor Status: Test How Solicited: Email
 Organization: Operational Services Division
 Fiscal Year: 15 Department: OSD01 - Operational Services Division Location: OSD0P - Congress St
 Show On Web: Yes Allow Electronic Quote: Yes Required Date:
 Bid Opening Date: 09/30/2014 09:44:00 AM Available Date: 09/21/2014 09:44:00 AM
 Purge Date:
 Bid Type: Open Bid Informal Bid: No
 Control Code: Estimated Cost: \$0.00 Print Desc Detail:
 Alternate ID: Purchase Method: Open Market Catalog Id (for contract):
 Blanket/Contract Begin Date: Bulletin Desc: Type Code:
 Info Contact: Acknowledge inclusion required: No Pre-Bid Conference:
 U N S P S C Code Certified Required: No Hour of Acknowledge inclusion: 0.0
 Subcontractor Info: Quote Notification: No
 Date Last Updated: 09/21/2014 09:45:00 AM User last Updated: Buyer Buyer Item Single Award Only: No
 Ship-to Address: One Ashburton Place, Room 1017 Bill-to Address: One Ashburton Place, Room 1017 Print Format: Bid Print Form
 US Boston, MA 02108 US Boston, MA 02108
 Email: test@operscope.com Email: test@operscope.com

Notes:
 Solicitation Enabled: No
 Invoice Method: Three Way Match

Bidders:

Vendor Id	Vendor Name	Preferred Delivery Method	Notifications	Responded
0000001	RR Connelley	Paper Copy Mailed		No
0000129	The Tree House, Inc.	Paper Copy Mailed		No
0000187	Northern Business Machines, Inc.	Paper Copy Mailed		No
0000190	Greenough Packaging & Maintenance Supplies, Inc.	Paper Copy Mailed		No
0000197	Shamrock Scientific Specialty Systems, Inc.	Paper Copy Mailed		No
0000197	GROUPGLOBAL.NET	Paper Copy Mailed		No
201148	A and A Industrial Supply / ALBECO Fastener, Inc.	Email		No
202983	Canon U.S.A., Inc.	Paper Copy Mailed		No
203082	International Paper	Paper Copy Mailed		No
220108	Rish America	Paper Copy Mailed		No
222051	Konica Minolta Business Solutions USA, Inc.	Paper Copy Mailed		No
223724	Encore Images, Inc.	Paper Copy Mailed		No
223731	Sharp Electronics Corp	Paper Copy Mailed		No
226400	JBS Printing LLC	Paper Copy Mailed		No
201143	G A Bianco and Sons, Inc.	Paper Copy Mailed		No
4501	New England Office Supply (NEOS)(MWBE)	Paper Copy Mailed		No
4501	Muraco America, Inc.	Paper Copy Mailed		No

Directions

27. Click the **Summary** tab.

The Summary tab provides a recap of the Bid information. Shown here is the upper part of the Summary tab.

The Summary Tab displays all information input from previous tabs

Click the **Submit for Approval** button to submit the bid into the workflow for approval routing.

28. Shown here is the lower part of the **Summary** tab that provides a summary of each item on the bid as well as the action buttons currently available for the bid:

- **Submit for Approval**
- **Cancel Bid**
- **Clone Bid**
- **Print**

After reviewing the information, click the **Submit for Approval** button to submit the bid into workflow for approval routing.

Skipped Tabs:

- **Accounting: Phase II**
- **Routing:** populates after submission for approval

Transaction Size (Commonwealth Departments Only):

Attachments

Files:

Forms:

Item Information

Item # 1: Test ZBI - In Progress

U N S P S C Code: 44-10-31
 Printer and facsimile and photocopier supplies

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0	\$0.00	EA - Each	\$0.00		\$0.00	\$0.00

Manufacturer: Brand: Model:
 Make: Packaging:

Account Code: Amount:

There is no item accounting available for this item.

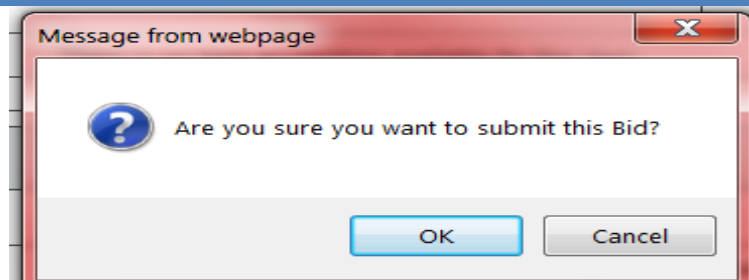
Submit for Approval Cancel Bid Clone Bid Print

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How to Clone a Bid in COMMBUYS

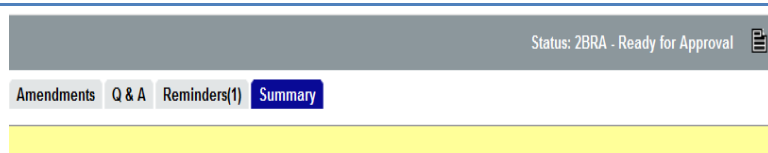
Screenshot



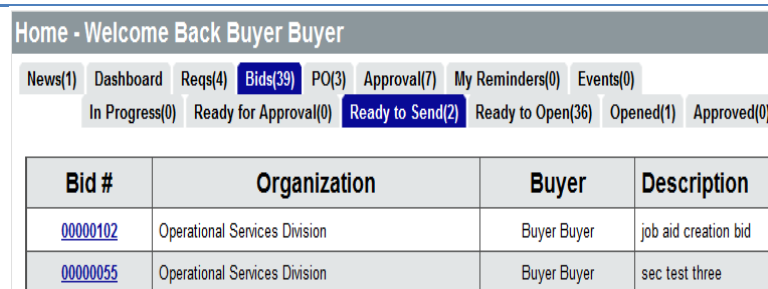
Directions

29. A Popup message displays asking 'Are you sure you want to submit this Bid?' Click **OK** to continue with the submission. To cancel the submission, click **Cancel**.

Click **Continue**.

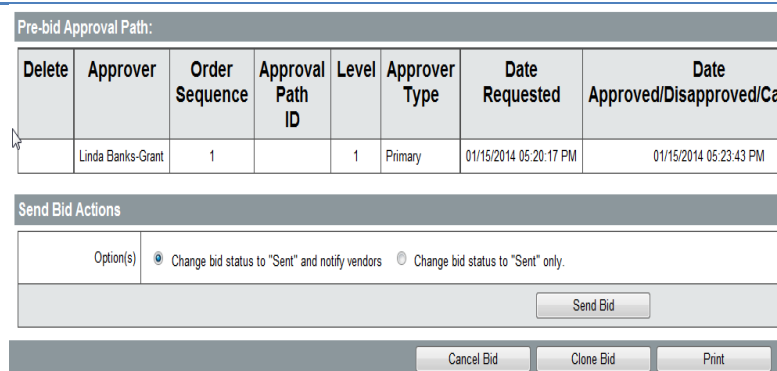


30. The Bid Summary tab redisplayes showing a status of Ready for Approval.



31. Once the Bid is approved, the Bid's status will update in your Control Center on the Home Page as shown here. The Bid has changed from **Ready for Approval** to **Ready to Send**.

Click on the Bid hyperlink to open.



32. The bid opens to the **Summary** tab. Scroll to the bottom of the page.

Under Send Bid Actions, Select either the RADIO button option:

- **Change bid status to 'Sent' and notify Vendor** – general rule to use this option
- **Change bid status to "Sent" only** – posts the Bid on COMMBUYS but does not send an email notification to the selected bidders.

Click on **Send Bid** button.

The bid is now posted on COMMBUYS, Vendor may be able to respond depending on the available date set on the General tab